

# Global Competition Moves Europe Toward Virtual Learning Environments

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## Abstracts

### Introduction

European higher education faces international competition, rising student expectations and budget constraints. The recession threatens an industry reliant on public funds. Struggling to increase quality, this region is committed to providing low-cost education. VLEs will be critical to an institution's ability to meet student expectations and address long-term cost and scalability concerns.

### Scope

Examines the culture and funding structure of higher education in Western Europe.

Analyzes the vendor landscape and market penetration of VLEs in European higher education.

Offers insight into trends toward online teaching and learning tools and recommendations for overcoming user-adoption challenges.

### Highlights

The global economic crisis has spurred a shift toward online learning in higher education.

Institutions are competing for students and those that can provide flexible, convenient

options will come out on top.

VLE vendors entering Europe are challenged by a market crowded with legacy and homegrown solutions.

### **Reasons to Purchase**

Understand the changes higher education faces in the aftermath of an economic crisis.

Recognize the issues unique to institutions in Australia, France, Germany, the UK and US and how they influence technology decision-making.

Gain insight into the scope of the higher education market and opportunities for market penetration.

## Contents

### SUMMARY

Impact

Ovum view

Key messages

### EUROPEAN HIGHER EDUCATION IS STRUGGLING WITH ECONOMIC CHALLENGES

Budget reduction sets institutions as prime candidates for robust technology

European institutions are competing on a global playing field

Culture changes are necessary to accommodate new standards of higher education

### VENDORS STRUGGLE TO ADDRESS A CROWDED VLE MARKET

Interest in e-learning is increasing as institutions look for cost-effective teaching methods

Continuing investments reflect the rising interest in technology

VLE is not mission-critical technology-yet

Just because learning is moved online, does not mean it comes cheap

Vendors are looking for ways to penetrate higher education

Blackboard

Desire2Learn

Eledia

Fronter

it's learning

Jenzabar

Moodle

Sakai

### RECOMMENDATIONS

Recommendations for higher education institutions

Rely on technology to raise efficiency and effectiveness

Look to e-learning to reach the global population and enhance physical learning, teaching and research

Avoid short-term temptations around VLE

Recommendations for vendors

Institutions want a partner, not a technology provider

VLEs may be pervasive, but that does not mean institutions are satisfied

Understand the complexity of higher education in Europe and its impact on technology-buying decisions

## **APPENDIX**

Ask the analyst

Further reading

Methodology

Ovum Consulting

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